

Date/Time Stamp:

SENATORS AND OFFICERS POST-TRAVEL DISCLOSURE OF TRAVEL EXPENSES

This disclosure, along with a copy of the Private Sponsor Travel Certification Form and all attachments, MUST be provided to the **Office of Public Records, Room 232 of the Hart Building**, within **30 days** after the travel is completed.

In compliance with Rule 35.2(a) and (c), I Sen. Ted Cruz, make the following
(Name of Senator/Officer)
disclosures with respect to travel expenses that have been or will be reimbursed/paid for me.

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): June 2-3, 2021

Destination(s): Cedar Creek, TX

Name of accompanying family member (if any): Heidi Cruz

Relationship to Member/Officer: ☒ Spouse ☐ Child

FILL IN THE APPROPRIATE LINES. IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Senator/Officer:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	None	\$263.49	80.99	None
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable)

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	None	No additional cost for spouse	None	None
<input checked="" type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Sen. Cruz spoke at The Heritage Foundation's Resource Bank Meeting and Legal Strategy Forum and discussed

key policy issues facing the country and U.S. Congress. He also attended a lunch held for all attendees in between the two
sessions at which he delivered remarks on June 3, and recorded an interview with Heritage's podcast team. Final agenda attached.

I HAVE MADE A DETERMINATION THAT THE TRAVEL DESCRIBED ABOVE WAS IN CONNECTION WITH MY DUTIES AS AN OFFICEHOLDER, AND DID NOT CREATE THE APPEARANCE THAT I WAS USING PUBLIC OFFICE FOR PRIVATE GAIN.

6/28/2021

(Date)

7-18

(Signature of Senator/Officer)



April 1, 2021

The Honorable Ted Cruz
United States Senate
127A Russell Senate Office Building
Washington, DC 20510

Dear Senator Cruz:

We are several weeks into 2021 and it's clear there will be no reprieve from the tension and chaos in America unless we are willing to lead vigorous debates on the most critical issues of the day. Conservatives have the difficult task of articulating a pathway forward for the country at a time when our voices are not truly welcome everywhere. However, if we are grounded in our principles and willing to work together to meet today's challenges, there is so much reason to be optimistic about our future.

One of the ways in which The Heritage Foundation brings key voices together is at our annual **Resource Bank Meeting**. This year we meet **June 1-4** at the Hyatt Regency Lost Pines outside of **Austin, Texas**. Our attendees are a diverse group of influencers, leaders, and decision makers who come ready to have these strategic conversations and are dedicated to the difficult work at hand. Our hybrid format will also engage attendees virtually beyond Austin.

We would be thrilled to have you lend your perspective to these leaders as a speaker during the morning plenary session on Wednesday, June 2. Your insights on the challenges we face from the Left – with the Corrupt Politicians Act, a porous Southern border, and precarious policies abroad – will be a powerful framework for our theme for the meeting, *Challenge 2021*.

Previous Resource Bank speakers have included congressional leaders, talk show hosts, federal judges, political strategists, notable authors, and many others. We would be delighted to add your name to that list of influential voices.

If you are interested, please respond by Wednesday, April 21, to our senior event planner, Renae Morinaga, who can be reached at renae.morinaga@heritage.org or 202-608-6031.

We would be honored to host you, and I personally would love to see you there.

Sincerely,

Kay C. James
President

04.26.21



RESOURCE BANK MEETING AND LEGAL STRATEGY FORUM

Draft Agenda

JUNE 2-3, 2021 | HYATT REGENCY LOST PINES RESORT | CEDAR CREEK, TEXAS

Wednesday, June 2

7:30 p.m.

*Arrival time for Sen. Cruz to Hyatt Regency Lost Pines*Thursday, June 311:50 a.m. – 12:30 p.m. **Plenary Session***Lost Pines Ballroom***This is How You Fight**

No matter the challenges, we know America is worth fighting for. We celebrate citizens speaking out, philanthropists sparking change, and legislators taking action. Together, we will bring these solutions to every community across the country.

Moderator: **Genevieve Wood**, Senior Advisor and Spokesperson,
The Heritage Foundation

The Hon. Ted Cruz, United States Senate (R-TX)

Vivek Ramaswamy, Entrepreneur and Author

Elise Westhoff, President and CEO, The Philanthropy Roundtable

12:30 – 1:30 p.m.

Luncheon*Lost Pines Ballroom***Common Sense in a Senseless World: A Conversation with
Thomas Sowell Biographer, Jason Riley**

Author, journalist, and Thomas Sowell Biographer, Jason Riley, discusses his new book, "Maverick: The Biography of Thomas Sowell." This important work traces the life events that shaped Sowell's ideas and resulted in a Black orphan from the Jim Crow South becoming one of our foremost public intellectuals.

Moderator: **Rob Bluey**, Vice President, Communications,
The Heritage Foundation

Jason Riley, Columnist, The Wall Street Journal, and Author,
"Maverick: A Biography of Thomas Sowell"

1:45 – 2:30 p.m.

Legal Strategy Forum Plenary Session04.26.21
Baron Ballroom D**The Current State of Play in Congress***A conversation on the current state of play in Congress and the Biden Administration, including court-packing, filibuster reform, HR 1, Electoral College, equity agenda, border crisis, and more.*Speaker: **The Honorable Ted Cruz**, *United States Senate (R-TX)*Moderator: **John Malcolm**, *Vice President, Institute for Constitutional Government, The Heritage Foundation*

3:00 – 3:30 p.m.

Interview with *The Daily Signal* podcast team*Lost Pines Foyer**Sen. Ted Cruz recorded an interview for future publication on The Daily Signal's podcast, which discussed the day's leading headlines and provides commentary on the policy debates playing out in America*Interviewer: **Virginia Allen**, *Congressional Reporter and Podcast Co-Host, The Daily Signal***The Honorable Ted Cruz**, *United States Senate (R-TX)*

3:30 p.m.

Departure time for Sen. Ted Cruz from the Hyatt Regency Lost Pines

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation
 2. Description of the trip: The Senator is invited to speak at The Heritage Foundation's Resource Bank Meeting and Legal Strategy Forum to discuss key policy issues facing the country and U.S. Congress.
 3. Dates of travel: June 2-3, 2021
 4. Place of travel: Cedar Creek, Texas
 5. Name and title of Senate invitees: Sen. Ted Cruz, Sen. Tom Cotton, Sen. John Cornyn
 6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR -
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation is the sole sponsor, organizer, and funder of the Resource Bank Meeting and Legal Strategy Forum, but other organizations sponsor individual aspects of the event, such as receptions

The events convene leaders to discuss current policy issues and best practices in think tank management

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation's mission is to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. Resource Bank & Legal Strategy Forum convene leaders to discuss these topics.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation has sponsored congressional trips for decades, including sponsoring Members of House and Senate to speak at events around the country and hosting for several years the annual Conservative Members Conference for House Members, most recently in 2019.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation hosts hundreds of educational programs annually at its DC headquarters and around the country, focused on a variety of policy issues. Heritage also produces thousands of articles, videos, and white papers related to policy issues, read by hundreds of thousands annually.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$1,400 ground transportation round trip	\$242.74	\$118.13 (includes breakfast and lunch as provided to other attendees)	None

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This event is arranged and organized without regard to congressional participation.

18. Reason for selecting the location of the event or trip

Central location in continental United States for attendees from across the country

19. Name and location of hotel or other lodging facility:

Hyatt Regency Lost Pines Resort

575 Hyatt Lost Pines Rd., Cedar Creek, TX 78612

20. Reason(s) for selecting hotel or other lodging facility:

Hotel offered suitable meeting space and accommodations to meet event needs at reasonable pricing.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lodging and Meals & Incidentals is slightly higher than per diem. This lodging and meal package is offered to all attendees without regard to Congressional participation. These rates are comparable to rates offered by venues of similar caliber in the area and were further discounted as part of Heritage's contract.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Private car service to provide round trip ground transportation between Houston and Austin.

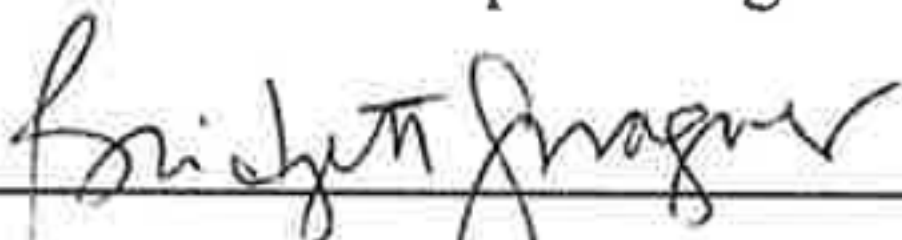
23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:



Name and Title: Bridgett Wagner, Vice President, Policy Promotion

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Ave NE, Washington, DC 20002

Telephone Number: 202-608-6050

Fax Number:

E-mail Address: Bridgett.Wagner@heritage.org

CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

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JEANNE SHAHEN, NEW HAMPSHIRE

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DEB FISCHER, NEBRASKA

DEBORAH SUE MAYER, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM CABLE, CHIEF CLERK

MAINT SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20510-0425

TELEPHONE: (202) 224-2801
FACSIMILE: (202) 224-7410
TDD: (202) 228-3762

United States Senate

SELECT COMMITTEE ON ETHICS

May 28, 2021

The Honorable Ted Cruz
United States Senate
Washington, DC 20510

Dear Senator Cruz:

This responds to your recent correspondence concerning an invitation you received to travel to the *Resource Bank Meeting and Legal Strategy Forum* in Cedar Creek, Texas, on June 2–3, 2021, sponsored by The Heritage Foundation. The Heritage Foundation certified to the Select Committee on Ethics (the Committee) that it will pay the *necessary expenses*¹ related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. The Heritage Foundation has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at *any point throughout your trip*.²

Based on information and materials available to the Committee, and assuming the **actual** travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip **may be accepted** under relevant Senate Rules and the Committee's *Regulations and Guidelines for Privately-Sponsored Travel*, so long as at the time of the payment or reimbursement, The Heritage Foundation is neither a registered lobbyist or lobbying firm under the Lobbying Disclosure Act of 1995, or an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, a Senator or officer who receives payment or reimbursement for necessary expenses related to fact-finding travel must disclose those expenses to the Secretary of the Senate by filing the completed *Senators and Officers Post-Travel Disclosure of Travel Expenses* (Form RE-3), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel**.

Finally, Senate Rule 34 requires a Member, on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35

¹ The term "necessary expenses" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

² The term "any point throughout your trip" has a specific definition. See *id.* at 2.

from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$415 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Shannon Hamilton Kopplin
Acting Chief Counsel and Staff Director

Enclosure: Travel Checklist